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ABSTRACT

The processes and kinds of sources used in comprehensive educational planning employing institutional research are described to serve as a guide to provide recurrent education for a middle-aged population. The concept of lifelong learning has been addressed by postsecondary institutions because the traditional-aged college population has been declining in numbers. Long-range planning has been conducted by the San Diego Community College District to provide services through its evening college and adult and continuing education program. Forecasts of demographic and economic change into the 1990s and feedback from college staff, students, and citizens provided a sense of the value preferences of the people. The impact of the Jarvis-Gann initiative, which required that programs must be rigorously justified as a public benefit to merit public tax subsidies, was felt on the short-term and long-term planning perspective. It is proposed that the vital foundation of institutional research in the planning context are reasonable forecasts of demographic, economic, and social change into the future appropriate to the kind of planning problem. (SW)

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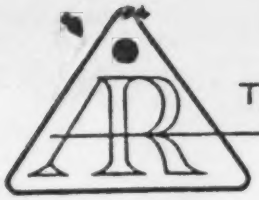

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Association for Institutional Research
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San Diego, California
May 14, 1979
Contributed Paper: Adapting to Adult Student Profiles

The Middle-Aging 'Eighties in San Diego: Prospects for Lifelong Learning

Thomas R. Mason

The most predictable social change over the coming ten and twenty years in North America is the middle-aging of the population. In San Diego and in the rest of the United States, Canada, and most of Europe, the Baby Boom between 1940 and 1960 that quadrupled postsecondary education enrollments over the past twenty years is now moving into that dreaded over-thirty condition. By 1999 the population in their middle years between 30 and 55 nearly doubles. The adolescent and young adult population will shrink about ten per cent. What does that clearly affirmable forecast of demographic aging mean in terms of program planning for colleges and universities?

In the early 1970's, the councils of postsecondary education, including the AIR Forums, began to express with considerable anguish and fear a growing apprehension of forthcoming change. The drop in the birthrate between 1960 and 1973 would begin to affect a steady drop in the numbers of 18 year olds from 4.2 million to 3.4 million in 1990 in the U.S. Starting in 1978, the traditional college-age population would shrink by some 20 per cent in the 1980's.

After a period of panic a few years ago, the entrepreneurs of postsecondary education began searching for a new clientele for the abundant faculty and facilities capacities created during

two decades of dramatic growth. Increasingly, the concept of lifelong learning has emerged as the salvational central idea for planning new directions for postsecondary education in the 1980's. The rapid growth of mature adult population clearly is the major target market as higher education shifts from a boom to a depression in its traditional young adult clientele.

What does this lifelong learning business mean in terms of the content, organization, delivery, and purposes/outcomes of postsecondary educational programs? What specific kinds of changes in programming the educational products are needed to be able to attract this new market of mature, working, and actively busy adults?

In 1974, the American Association for Higher Education centered its conference papers on the title, Lifelong Learners -- A New Clientele for Higher Education (Vermilye, 1974). In his paper called "Breaking Up the Youth Ghetto," Ernest L. Boyer (1974) suggested that

> increasingly, we mix formal and informal learning throughout the adult working years. By this, I don't mean some vague commitment to "continuing education," a term we've spread like a musty blanket over all sorts of instruction for people over twenty-one. Rather, I mean recurrent education developed for specific groups of adult students to meet specific needs.

Boyer's phrase "recurrent education developed for specific groups of adult students to meet specific needs" made much sense to me over the past year as I worked as principal consultant to San Diego Community College District developing twenty year educational master plans for its San Diego Evening College and its large Adult and Continuing Education program. This paper describes

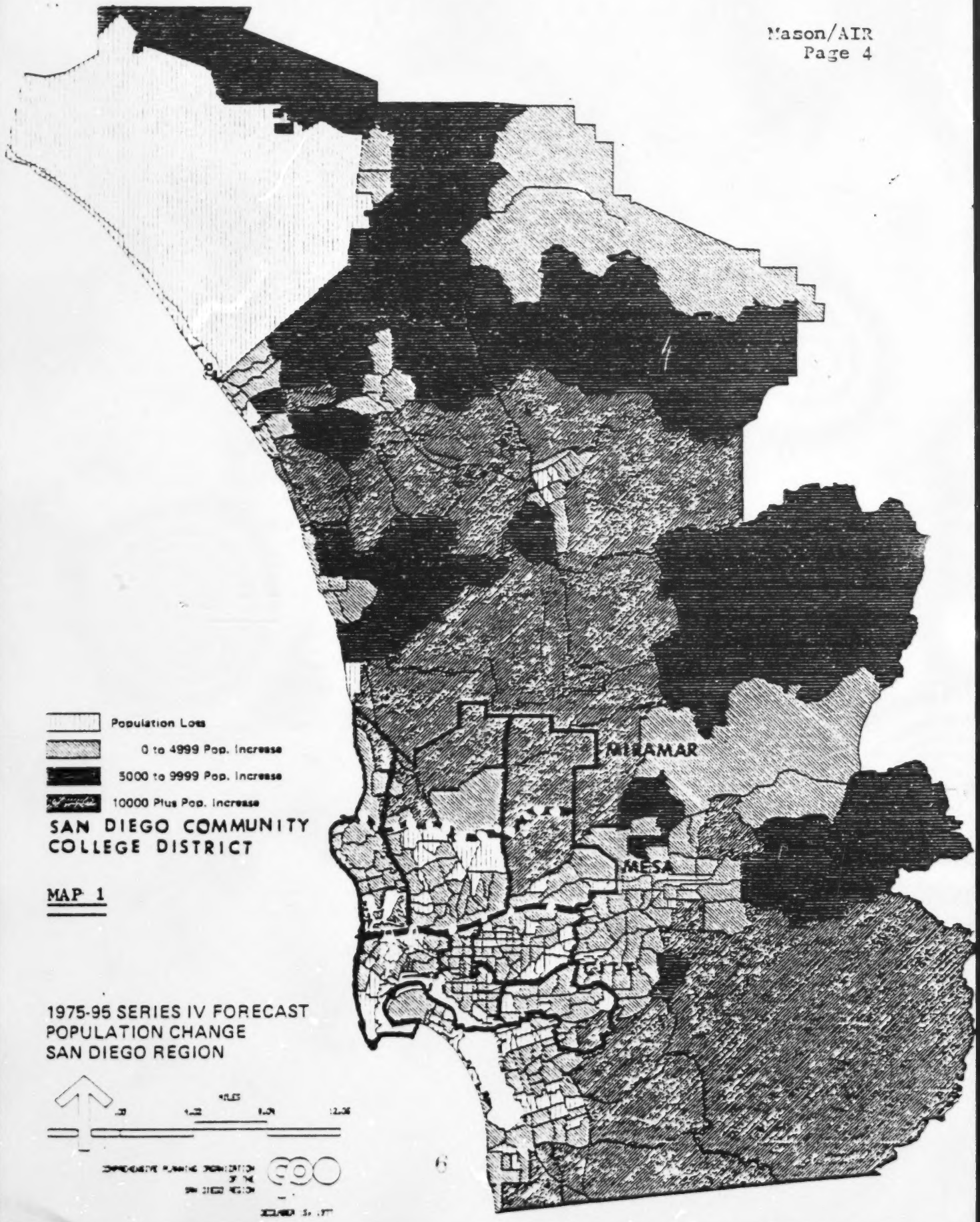
the institutional research process invested in development of those comprehensive long-range educational program plans. (MIRA, 1978.)

The Planning Context: San Diego Community College District, 1978

San Diego Community College District, one of the largest multi-campus community college organizations in the U.S., is at the core of the San Diego metropolitan cordon. The District covers about three-fourths of the land area in the City of San Diego, all but South San Diego and the upper part of North San Diego. The District now includes 84 per cent of the City's population and 98 per cent of its employment. With four distinct colleges, three college campuses, and seven adult community college centers, the District enrolls over 70,000 students each year -- over 10 per cent of the population. (Map 1.)

San Diego Evening College serves 25,000 headcount students in fully accredited associate degree, certificate, and apprenticeship students. Without a campus of its own, the Evening College operates all over the District under the bannerline, "The Community is our Campus." Operating with its own faculty and full student and administrative service staff, Evening College is uniquely a complete night program rather than an extended day program. From its beginning, Evening College has focused on the mature adult working student seeking higher education nights and weekends. Half its students are over 30.

The Adult and Continuing Education Program enrolls 36,000 individual students each year, mostly in noncredit part-time programs, from the seven adult centers and taking classes to several hundred satellite sites in schools, offices, church basements, and factories. A combination of the traditional


Population Loss
0 to 4999 Pop. Increase
5000 to 9999 Pop. Increase
10000 Plus Pop. Increase
SAN DIEGO COMMUNITY COLLEGE DISTRICT
MAP 1
1975-95 SERIES IV FORECAST
POPULATION CHANGE
SAN DIEGO REGION
MIRAMAR
MESA

adult education personal development courses and contemporary continuing education, the San Diego program is especially active in developmental/remedial adult basic education, English as a second language, job entry skills preparation, and competency-based education. Under agreement with the Unified School District, the community college adult program carries most of the eighth-grade completion and high school certification programs for adults 18 and over. Because of this (and because all of the District's units are doing education of adults and continuing education), the planning consultants recommended that this unit be renamed the Developmental Education Division, with its main focus on overcoming the growing educational deficit of adults that lack minimum competencies of basic learning skills needed to participate in a society that increasingly requires lifelong learning.

As principal consultant for MIRA Incorporated, I literally moved to San Diego in March, 1978, and did four months of total immersion on-site talking with some 200 of the officers, faculty, staff, and students of the District and about 50 citizens, civic leaders, community planners, businessmen, and labor leaders; data search and analysis; and analysis and interpretation of forecasts of demographic and economic change into the 1990s. That process gave the planning researcher a sense of the value preferences of the community and the District's leaders, staff, and clientele. During that spring of 1978 almost total attention of the District and community personnel was concentrated on the forthcoming election in the State of California on June 6. The power of that attention was the item on the ballot called Proposition 13 -- the

now nationally famous and infamous Jarvis-Gann initiative. This constitutionally prescribed proposal would require radical reduction and containment of the local property tax. Since the property tax is a significant source of funds to the community college and the basis that gives the community college district its degree of local freedom from total control of the state system, the campaign obviously absorbed the attention and concern of the District personnel. While the general expectation was that Proposition 13 would pass, the hope that it wouldn't limited speculation about its consequences except for the obvious cut in financial resources. That cut would amount to nearly $10 million in the District's $65 million budget.

On June 6, 1978, the electorate of California overwhelming approved Proposition 13. On June 7, the fuller meaning of Proposition 13 began to emerge. While the State's surplus would help mediate the cut in funding during 1978-79, the urge to cut State taxes also was very strong. Obviously, more authority over the community colleges was going to pass to the State and Federal funding sources with the basis for a degree of local autonomy so drastically cut. What became clear starting on June 7 is that the San Diego Community College District and other local programs now must be far more rigorously justified as a public benefit if they are to merit any public tax subsidy. Clearly, California higher education was going to have to move much more toward user-fee financing. The key planning question, both for short-term and long-run perspective, is this: <u>What programs are really worth public tax subsidy</u>, and <u>what programs are likely to be attractively beneficial enough to survive under user-fee financing</u>?

Forecasts: Demography, Economy, and Urban Ecology

The vital foundation of institutional research work in the planning context are reasonable forecasts of demographic, economic, and social change into the future appropriate for the kind of planning problem. That relatively solid forecast base helps define the more likely and desirable alternative scenarios of how that future might look, act, feel, and perform desired outcomes.

Demography is the most solid ground. Although changes in the birthrate and death rate sometimes are dramatic (as in the 1940s), they usually are fairly predictable. Since the college entrants 18 years from now are already born, a 20 year forecast is highly acceptable. The less predictable dynamics of a given population are migration from one locality to another, the types of migrants, and the probabilities of participation in higher education of a given population cohort.

The most certain demographic forecast, given the absence of war, epidemic, and natural disaster, is the aging of the population. I am positive I will be 50 years old in 1980. There is a 50 per cent chance that I will be dead by 1990 because the average life expectancy of males born in 1930 in the U.S. is 58.1 years. If alive in 1990, there is a 30 per cent chance that I will be active in some organized form of lifelong learning because of the addictive nature of education, and I have 24 years of formal training in that addiction. My nephew who was a high school dropout has less than a five per cent probability of engaging in some kind of organized adult education. (Cross, 1978.)

For the San Diego project, excellent demographic forecasts

are available to 1995 from the Comprehensive Planning Organization of the San Diego Region (1978). From its Interactive Population-Employment Forecasting Model (IPEF) with which forecasts and assumptions had been thoroughly tested, revised, and modified over a five-year period, detailed age and sex population projections were available at five-year intervals from 1975 to 1995. Since the input data and forecasts in the model are lined to a grid map of the entire region tied to census tracts and other subareas, CPC ran the model outputing the forecast data into the three college regions and the seven adult service areas of the San Diego Community College District.

These population age and sex forecasts proved to be the most significant, as well as reliable, basis for futurist speculation about the potential program development of San Diego Evening College and the Adult and Continuing Education/Developmental Education Program. These clearly demonstrate the middle-aging of the population in San Diego Community College District, as shown in Figure A. The shrinkage of the cohorts between 15 and 29 years and the two-thirds increase in the projected population between 30 and 54 years (with doubling of the 35-44 cohort) between the 1975 special census of the region and the 1995 forecast are vivid. Note also that the attraction of San Diego in the sunbelt and by the sea substantially increases the over-55 population for retirement. That cohort, by the way, will double by the year 2025. While the traditional college age population shrinks, the 0-14 years group grows because, even though the birthrate remains low, the numbers of parenting age now are double the numbers of parenting

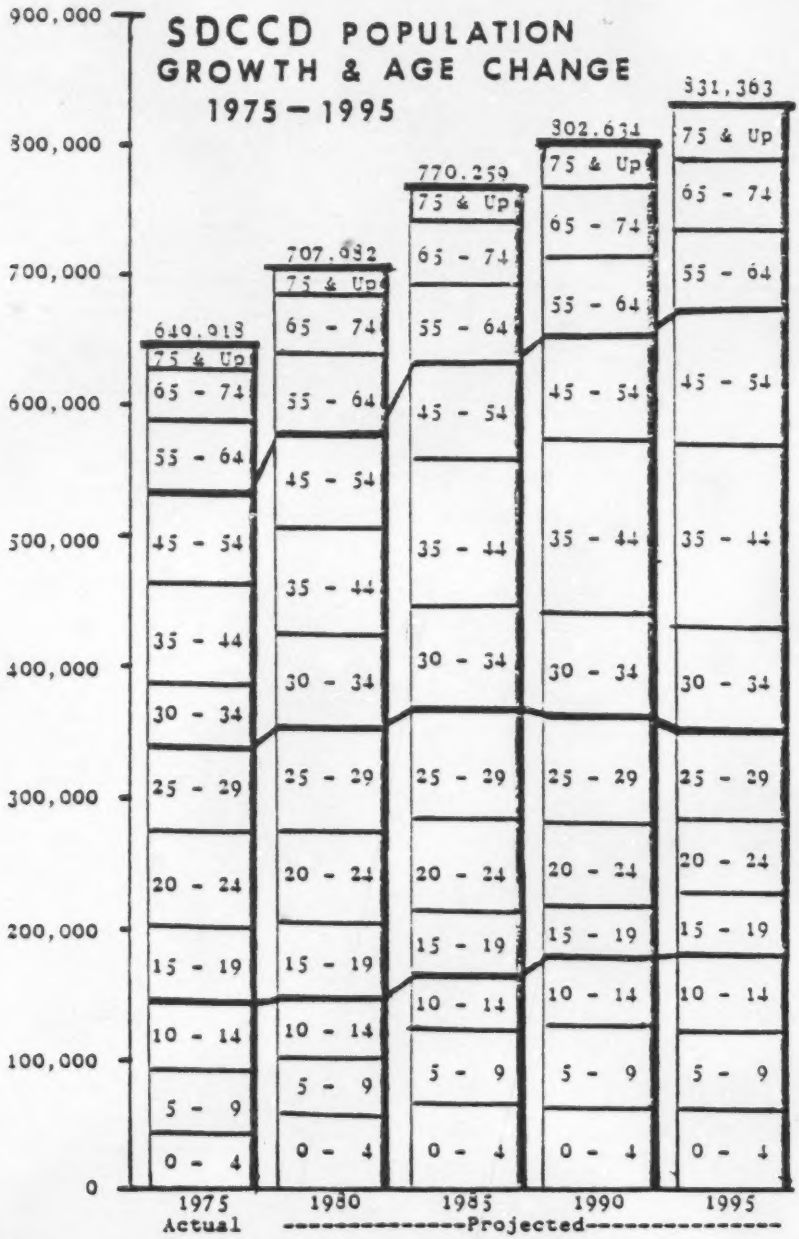


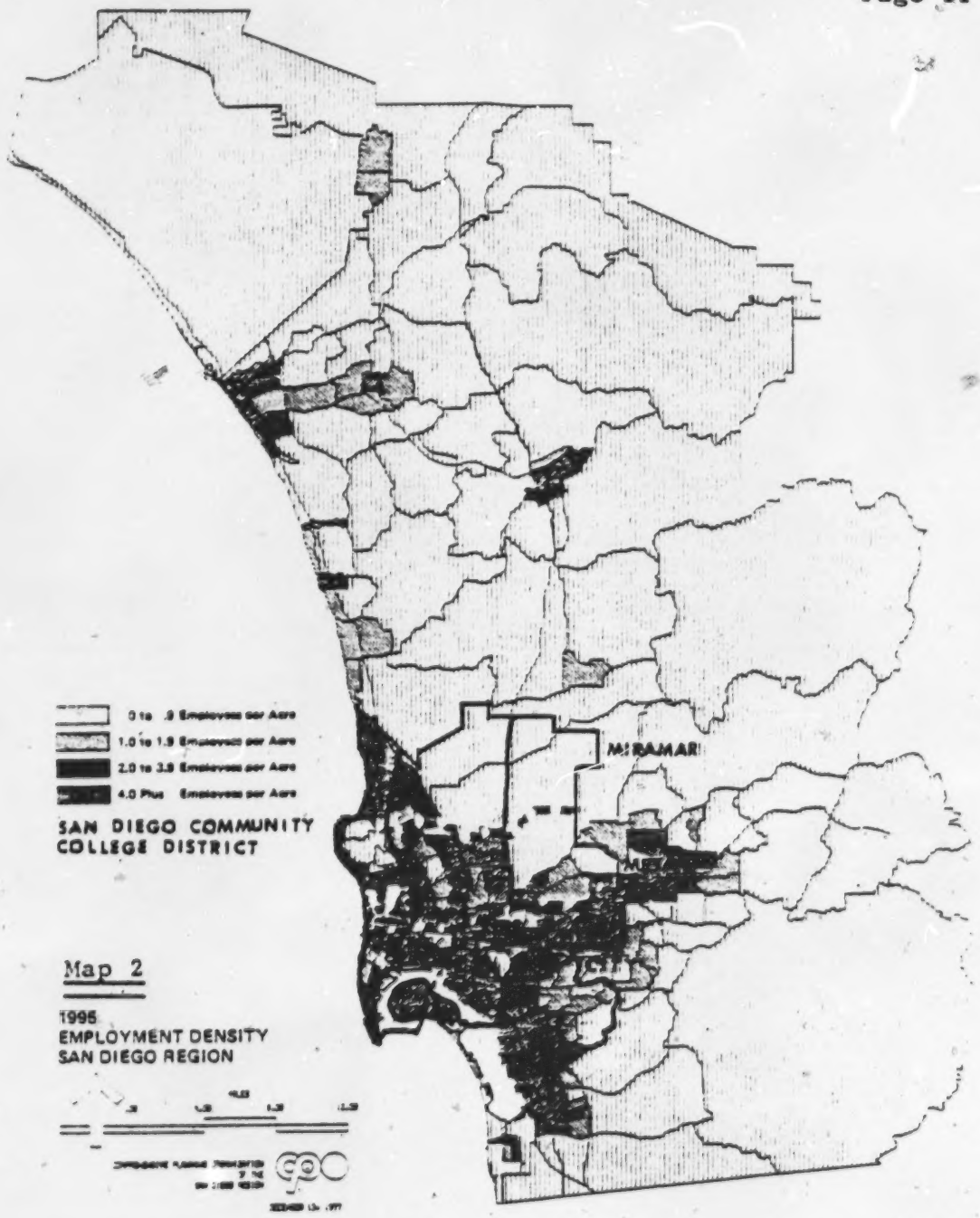
FIGURE A

SAN DIEGO COMMUNITY COLLEGE DISTRICT
Household Population by Age Group
Comprehensive Planning Organization Series IV Forecasts

age in 1955 at the peak of the Baby Boom. With the expectation of a ZPG fertility rate continuing, however, the numbers of children are likely to decline again after 1995, unless there is another surprise change like the one between 1940 and 1960.

In addition to the excellent demographic forecasts available for San Diego, the Comprehensive Planning Organization in cooperation with the County Integrated Planning office and the San Diego Gas and Electric Company has developed good employment forecasts by type of job and subareas of employment location. Although any economic forecasts have far less reliability than the age/sex demographic projections, these thoroughly model-tested job forecasts for the San Diego region are excellent indicators of where and what types of job demand are likely. They are excellent input for the programming of vocational/technical programs in the community colleges, especially when supplemented by a team of vocational/manpower coordinators working with advisory councils in the various trades and industries. (Map 2)

Estimates of the potential changes in the urban ecology showed the increasing higher density of residential and employment in various sectors of the District. The much closer spacing of people and institutions demand increased cooperative interdependency of residents and commuters for survival of any urban life quality. The psychological as well as the pragmatic need for a stronger sense of community, as well as the necessity for citizenship, will increase. These kinds of forecasts are highly speculative, very dependent on the qualitative values sought that are a growing part of the content of the educational processes.


0 to .9 Employees per Acre
1.0 to 1.9 Employees per Acre
2.0 to 3.9 Employees per Acre
4.0 Plus Employees per Acre
SAN DIEGO COMMUNITY
COLLEGE DISTRICT
MIRAMAR

Map 2

1995
EMPLOYMENT DENSITY
SAN DIEGO REGION

The Values Dimension: Research for Speculation on Social Change

The quantitative demographic and economic forecasts yield quantitative estimates of changes in numbers of kinds of people that may be served by different kinds of educational programs. The clearcut prospect of the middle-aging 'eighties in San Diego specifically ties to changing the educational programs to respond to and attract adults in their middle years for recurrent education. That shifts the ground to the qualitative values dimension: What qualities of life are we seeking in our middle years that can be served by various kinds of learning activities? What kinds of purposes and outcomes can we seek through educational programs that will benefit the life of the individual, the shared life of the individual with others, and the betterment of the qualities of urban community life?

This is the process of translating data into qualitatively meaningful information by the application of intelligence. I have advocated that "A central function of institutional research is the translation of complex data...into comprehensible information to serve the policy-making, planning, and governing processes of the institution." (Mason, 1971, p. 173.) I then cite Rosove (1967, p. 3) that "Information is the concept of relating data which are otherwise meaningless to some specified human purpose or objective."

After three months of immersion in the context of San Diego Community College District, the passage of Proposition 13 brought this management information researcher to a clear realization that he must now research the values dimension: Given the forecast data showing the growing numbers of persons in their middle years

and the decline of the young adult numbers, what kinds of educational program purposes/outcomes are likely to attract and benefit mature adults in their midlife transitions?

If my planning research was going to yield any continuing value to the policymaking, planning, and program development processes of San Diego Community College District, I had to find the strongest value thrust that would justify the use of public tax funds for some kinds of adult recurrent learning opportunities and attract mature adults to **want** programs supported by user fees.

That led me to an extensive search of the literature on adult developmental psychology, just as my institutional research and planning work in the 1950's and 1960's led me to the burgeoning literature on child and adolescent development, the youth identity crisis, and the young adult transitions. In that search I had particularly valued the work of Erik H. Erikson in his Childhood and Society (1950, rev. 1963), Youth: Change and Challenge (1963), and Identity: Youth and Crisis (1968). A chapter in Childhood on the "**Eight Ages of Man**" had defined the predominant conflict of the mature adult stage as generativity v. stagnation or self-absorbtion. Generativity "is primarily the concern of establishing and guiding the next generation," with the positive outcome of the conflict being the positive value of care. Erikson wrote,

> In this book the emphasis is on the childhood stages, otherwise the section on generativity would of necessity be the central one, for this term encompasses the evolutionary development which has made man the teaching and instituting as well as the learning animal, (1963, p. 266.)

In this decade, Erikson had turned his main attention to adulthood, urging an issue on that subject in Daedalus (Spring 1976) that he subsequently edited in expanded version under the

title Adulthood. Erikson's life stages construct was appearing as a major influence in the popular books on the middle years, particularly Gail Sheehy's Passages (1976) and Nancy Mayer's The Male Mid-Life Crisis: Fresh Starts After 40 (1978).

Both Sheehy and Mayer had drawn heavily on the research of Daniel J. Levinson and his associates at Yale and their theory of adult development published in 1978 in The Season's of a Man's Life. In it the patterns of the transitions at age 30, the mid-life transition between 40 and 45, and the Age 50 transition were the main focus of the critical stages of maturing in which the adult undergoes or seeks new direction, adaptation, and self-reappraisal. Mentoring is cited by Levinson as a generative role.

Carol B. Aslanian's paper here today and her forthcoming book with Henry M. Brickell comprehensively reporting their study with tentative title,Americans in Transition: Life Changes as Triggers to Adult Learning, are very significant for the educational program researcher and planner. In fact, I have strongly recommended all of the work of Carol's associates in the College Board's Future Directions for a Learning Society as a vital source for the contemporary postsecondary educational researcher and planner. Its focus on the adult learner is proving to be the most valuable source I have experienced in the 25 years I have been doing institutional research and planning (e.g., Cross, 1978).

Finally, I want to call your attention to the forthcoming Adult Learning Activities: A Handbook of Terminology for Classifying and Describing the Learning Activities of Adults to be issued by the National Center for Educational Statistics in 1979.

In the San Diego project I have heavily used the national review draft (March 1978) and the final draft (June 1978) submitted by the National Center for Higher Education Management Systems to NCES. The work done by Roger Sell and his associates, especially on the development of definitions of learning activity purposes/outcomes, is a major advancement for use in institutional research as well as information systems development.

These sources on adult development and their linkages to the concept of "recurrent education developed for specific groups of adult students to meet specific needs" have been the major source for the research on the value dimension to make the middle-aging population data meaningful information for the policymaking and planning processes of San Diego District. Recent books by Richard N. Bolles (1978), Ronald Gross (1977), and R.E. Peterson and associates (forthcoming, 1979) on varied perspectives of lifelong learning and the basic discussions of adult learning by Howard Y. McClusky (1971) and Alan B. Knox (1977) have provided suggested alternative forms of delivery of lifelong learning to adults.

I have only tried to describe the processes and kinds of sources used in the comprehensive planning project using institutional research. The final document from the MIRA contract that contains the outcomes of the consultants' study, a 200-page volume entitled Educational Master Plans for Potential Community Development: 1979-1999, was delivered to the Chancellor of San Diego Community College District today. That document is intended to be a beginning and a continuing guide to the District's movement into the age of recurrent education for a middle-aging population.

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